

# EXHIBIT A



*The Company You Keep®*

New York Life Insurance Company  
New York Life Insurance and Annuity Corporation  
(A Delaware Corporation)  
NYLIFE Insurance Company of Arizona  
(Not licensed in every state)  
P.O. Box 6916  
Cleveland, OH 44101  
1-800-695-9873  
[www.newyorklife.com](http://www.newyorklife.com)

June 25, 2019

BARBARA JEAN BROWN LIVING TRUST  
C/O BOB SHELTON  
5103 CHAD DR  
ARLINGTON TX 76017

Annuitant: Barbara Jean Brown  
Annuity: [REDACTED] 98 and [REDACTED] 460  
Claim No.: 606747

## Take action so benefits can be paid.

Dear Bob Shelton:

Thank you for your patience as we reviewed the above claim. As you know per the beneficiary designation of the above policies there are multiple trusts with multiple dates. Per the information you provided there is only one current trust payable for the estate of the Barbara Jean Living Trust dated March 9, 1998, reinstated on April 23, 2015, August 17, 2017 and May 29, 2018. In order to pay this trust please read, sign, date and notarize the enclosed paperwork.

As soon as we receive the requested document, we will give this claim our immediate attention. Please be aware that any original documents needed to process this claim, such as the death certificate, will be retained in our records and cannot be returned.

We stand by our promise to be there for our beneficiaries. If you have any questions or need further assistance, please do not hesitate to contact a customer service representative at 1-800-695-9873, Monday through Friday, from 8 a.m. to 7 p.m. ET. Please say the word "Claims" at any time during the interactive menu to be transferred directly to the Claims Department.

On behalf of New York Life,  
Mary Beth Duirk  
Customer Service Claims

Enc.



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November 5, 2020

BARBARA JEAN BROWN LIVING TRUST  
C/O BOB SHELTON  
5103 CHAD DR  
ARLINGTON TX 76017

Annuitant: Barbara Jean Brown  
Annuity: [REDACTED] 198 and [REDACTED] 460  
Claim No.: 606747

## Take action so benefits can be paid.

Dear Bob Shelton:

We received the documents you submitted for this claim. Please be aware that additional information is needed at this time. In order to proceed with this claim, please submit the following:

- Release and Indemnification agreement, signed, dated and notarized.

As soon as we receive the requested document(s), we will give this claim our immediate attention. Please be aware that any original documents needed to process this claim, such as the death certificate, will be retained in our records and cannot be returned.

Please be advised that if we do not hear from you regarding this matter, we will have to consider the amount payable as abandoned property and escheat the funds to the State of Arkansas. It will then be necessary for you to contact the state if you wish to retrieve these funds.

We stand by our promise to be there for our beneficiaries. Please know that our New York Life Agents are also here for you and may contact you to assist in the claim process, including delivery of the death benefit proceeds. If you have any questions or need further assistance, please do not hesitate to contact a customer service representative at 1-800-695-9873, Monday through Friday, from 8 a.m. to 7 p.m. ET. Please say the word "Claims" at any time during the interactive menu to be transferred directly to the Claims Department.

*\*Please refer to the enclosed document titled Department of Insurance-Notice of Availability for more information on how to contact New York Life or your state's department of insurance.*

On behalf of New York Life,  
Mary Beth Duirk  
Customer Service Claims